ABE 4 Training Module: School Administration – Every-day activities

Overview

In this session, you will learn typical operations that a School Administrator or staff member can perform on regular basis.

Understanding Regular Activities of School Administrator Role

School Administrator, like other users of the system, can utilize principal capabilities of ABE Systems (working with referrals, interventions, FBA, observations, classes, tasks; using School reports and ABE Desktop Notifications Tool etc.). However, in addition to that, this role is granted extended privileges to manage and maintain the system. Such capabilities are listed below:

- References
- Audit Trial
- Advanced Student Operations
  - Archive a student
  - Delete a student
  - Merge students
- Interventions Review
- Referral Resolution
- Reports – Data Export
- Staff Management (staff profiles; staff import; user management in the system)
- Extended information in Tasks menu

These are operations that School Administrators may be required to do on a regular basis.

This training module will be focused on the above-mentioned specific capabilities of School Administrators.

Note: In addition to regular recurring operations, School Administrators are responsible for configuring School settings at the beginning of each school year. This part of responsibilities of School Administrators is covered in a separate training module – "Configuring Your School".

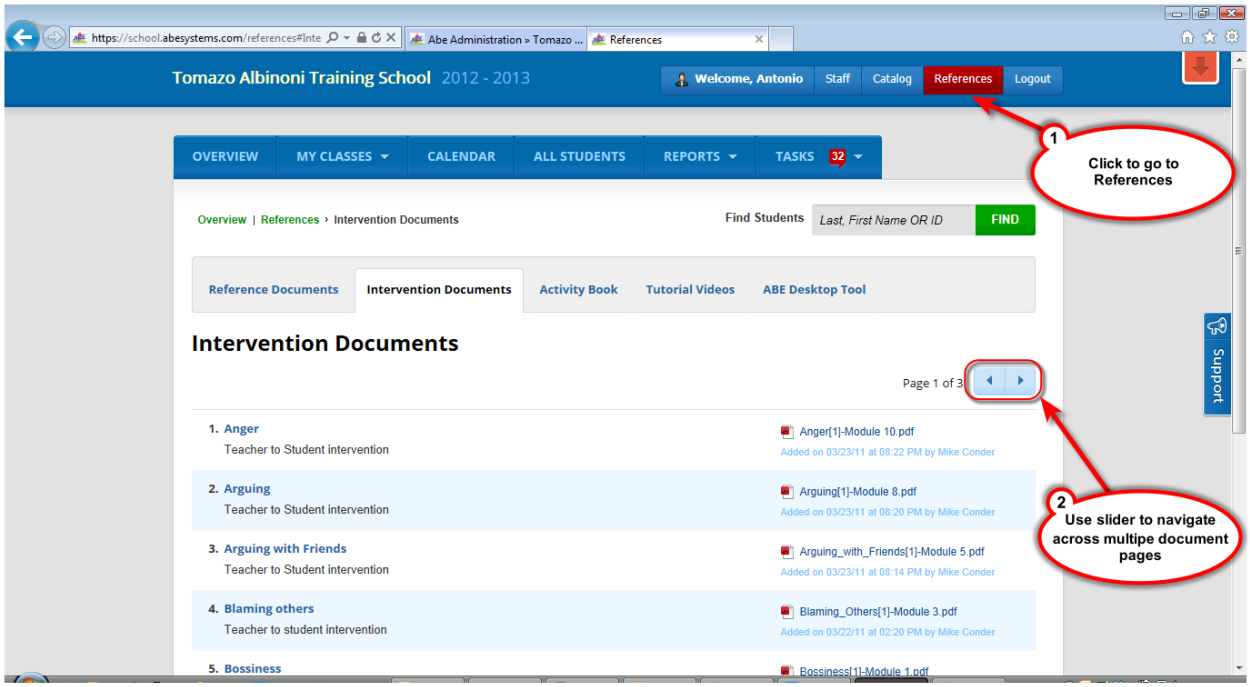
References

'References' is the collection of useful resources that School Administrators and Student Mentors can utilize in order to ensure ABE Systems is used according to the recommended best practices. It contains the set of useful documentation on

- ABE itself (the newest tool – Desktop Notification Tool – inclusive)
- Best practices in managing teacher-student interventions

- Activity Book for PK-3 students
- Various tutorial videos

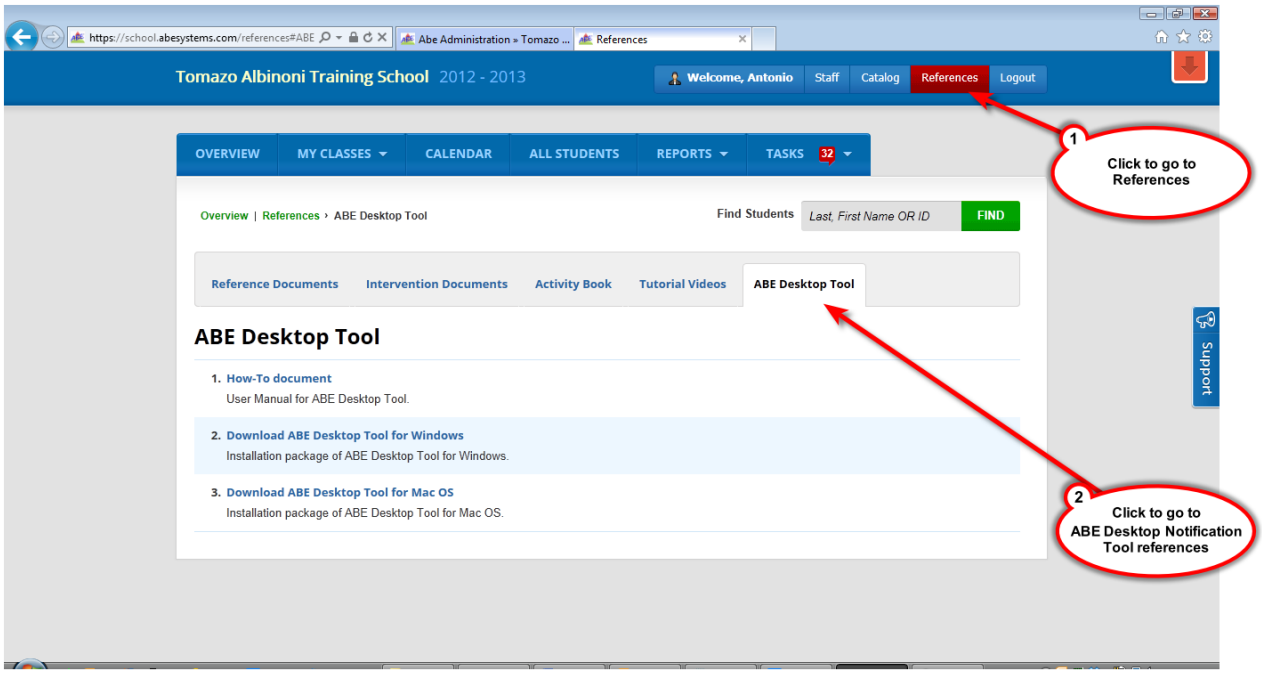
To review references, you click ‘References’ menu item in the top menu



Note: Student Mentors and Counselors will also have the access to References by default.

ABE Desktop Notification Tool References

Reference materials for ABE Desktop Notification Tool (latest clear installation binary packages for Win32/64 and Mac OS, User Manual) are located in *References > ABE Desktop Tool* tab



Note: Your school staff members (except for Proctors, Student Mentors, Counselors, and Assistant Principal) will not have access to References by default. It will be your responsibility to distribute binaries of ABE Desktop Notification Tool to those who is not able to download it from References view directly.

Advanced Student Operations

As a School Administrator, you are capable of doing advanced manipulations with students

- Archive a student
- Delete a student
- Merge students

The subsections below will review each of these operations in more details.

Notes:

1. Although technically possible, it is not recommended to grant permissions to these operations to non-Admin people (with less than advanced computer skills). The above-mentioned operations impose severe changes to student profiles and their activity records in the system which cannot be rolled back.
2. Users in Teacher role do not have permissions to add/edit student profiles by default. It is recommended to route their requests of this sort to Administrator and/or Assistant Principal (see "*Student Transfer*

The purpose of ABE student transfer is to move students across schools within the same district.

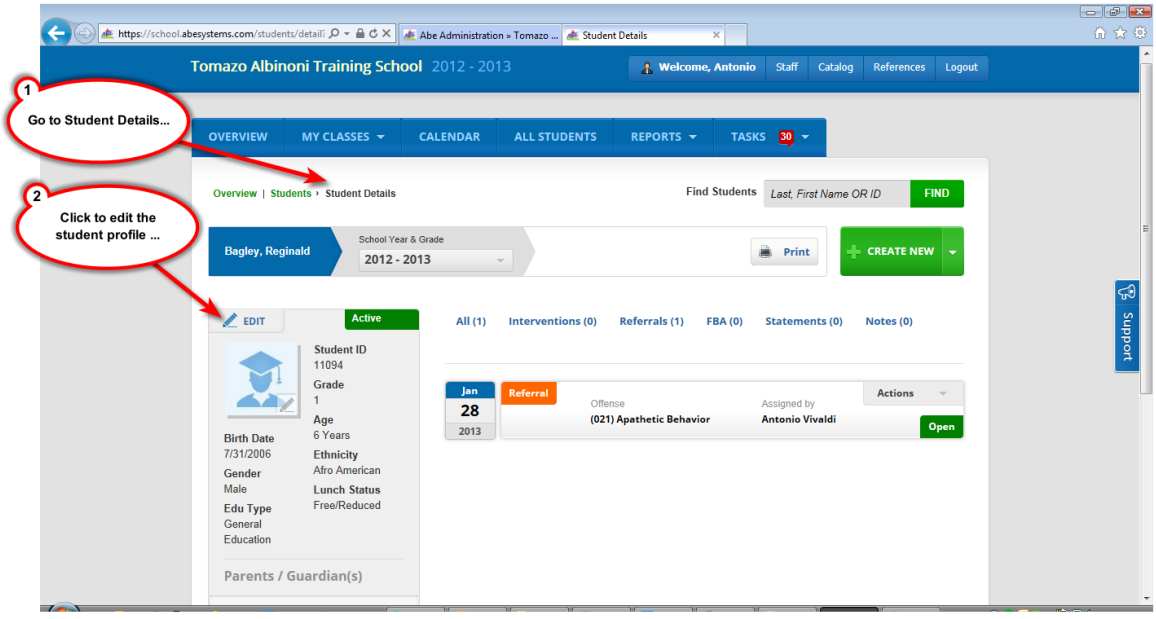
When a student is transferred, the following changes will occur in the source school (original school):

- When a student is transferred to a different school, all of the student records remain in the old school and are also copied (as read-only entries) into the new school
- If any interventions are opened, flagged, or in review at the time of the student transfer, they are force closed
- If any referrals are pending at the time of the student transfer, they are force closed
- If any FBA observations or Progress Monitoring observations are in progress at the time of the student transfer, they are force closed
- Transferred students are automatically removed from "My Classes" and their statistics do not show in Class Reports
- Transferred students are automatically excluded from the student count for the school (both in the manager site and in School Overview page)
- Records (Referrals, Interventions etc.) of transferred students in the current school year still contribute to the school reports for the current year
- Any pending Parent Letters are automatically switched to a 'Printed' state in the source school, and are transferred as "Printed" into the new school
- Transferred students will not show on All Students or student search results in the source school

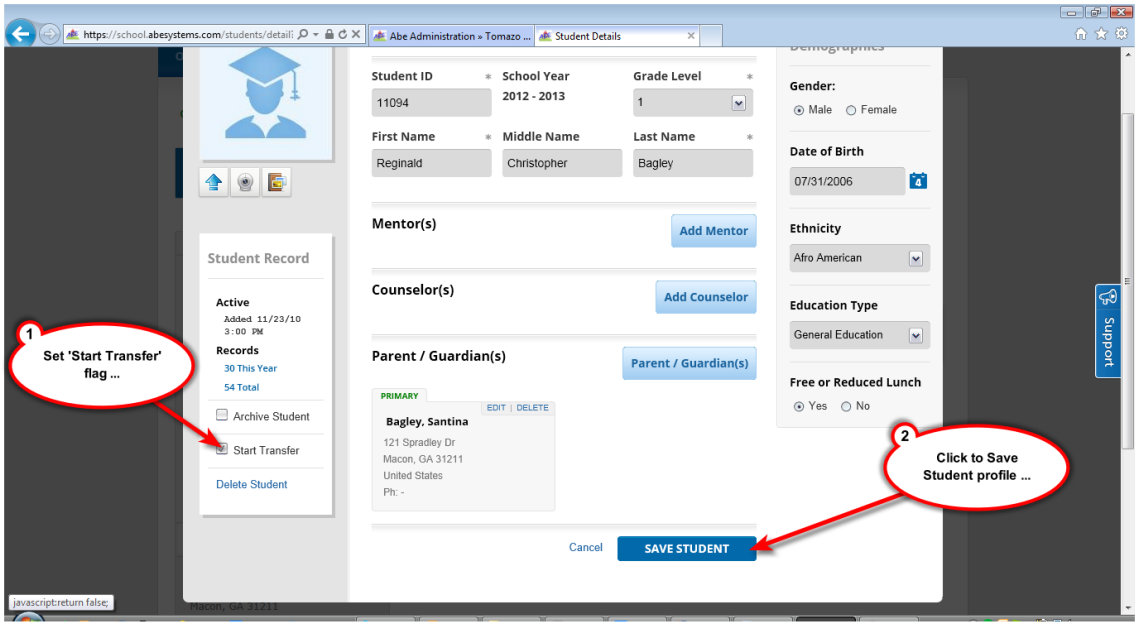
Individual Student Transfer

To perform transfer of individual students, complete the following:

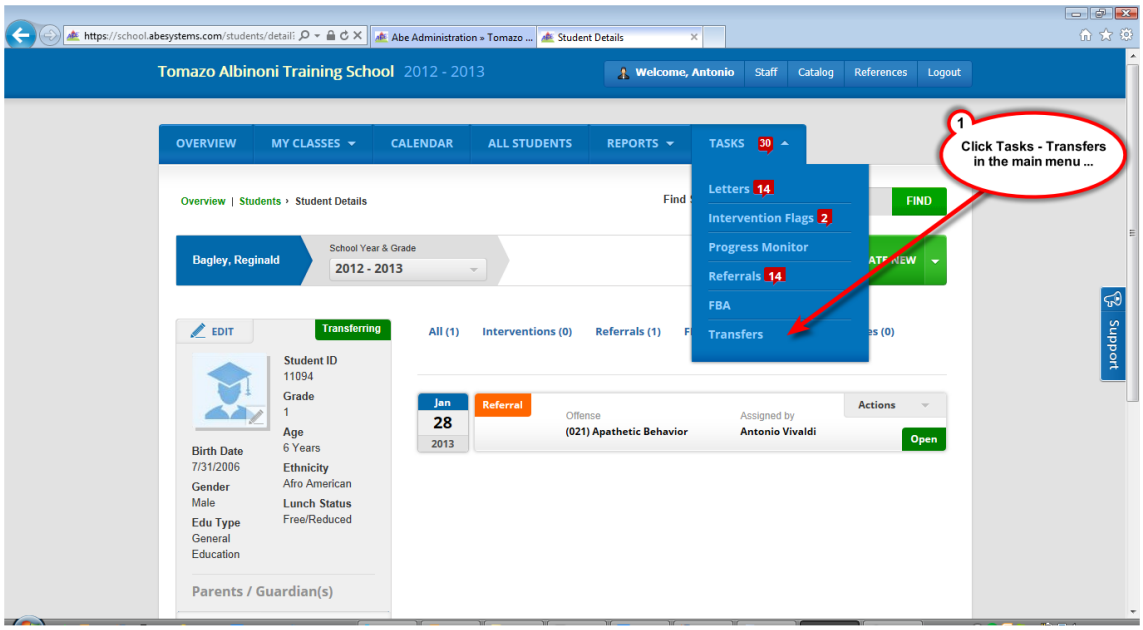
1. Go to the Student Detail Page of the student you would like to transfer and choose to Edit his or her profile:



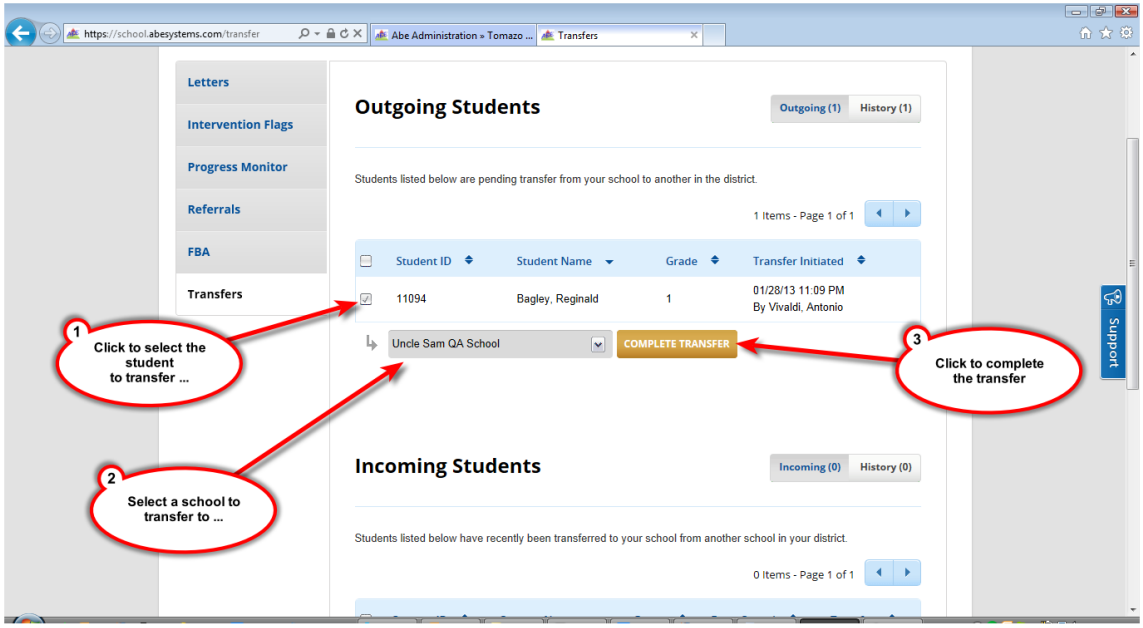
2. When in Student profile, check the 'Start Transfer' box and click "Save Student"



3. Go to *Task – Transfers* in the main menu

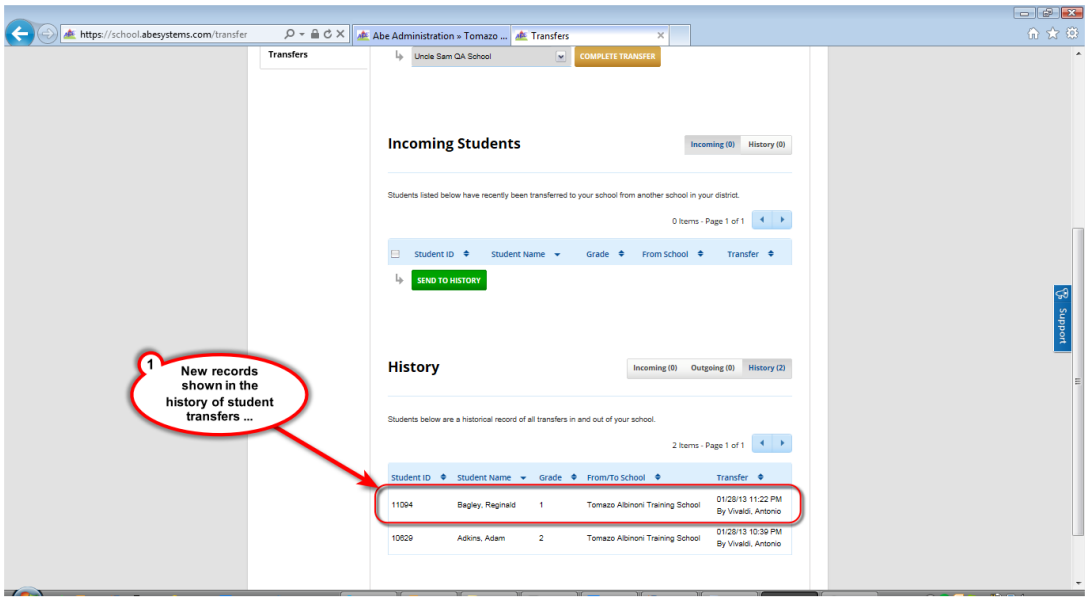


4. In the Transfers view, navigate to the 'Outgoing Students' section to complete the transfer as shown below:



Notes: If you have multiple outgoing students, you can select more than one student to transfer at one time.

5. Once the system completes the transfer, you will see updated Transfer History records at the bottom of the 'Tasks – Transfer' view



Note: ABE does not support automated transfer of students to another district. If your student is going under jurisdiction of another School district, you will have to archive this student in your school.

Student Transfer in Bulk Mode

When you bulk import students for a new school year, your data file will not contain students who transferred to another school within the district.

To set this, launch the Data Import Wizard (see School Configuration Module for more details on using Data Import Wizard). Choose 'Transfer.' as an action for students who are in the database for the previous school year but not on your current data import file.

As a result, such students will appear in the 'Tasks – Transfer' view. You will be able to complete the operations described above to transfer them to other schools as needed.

3. Best Practices" below for the entire list of recommended best practices to use the system)

Archive a student

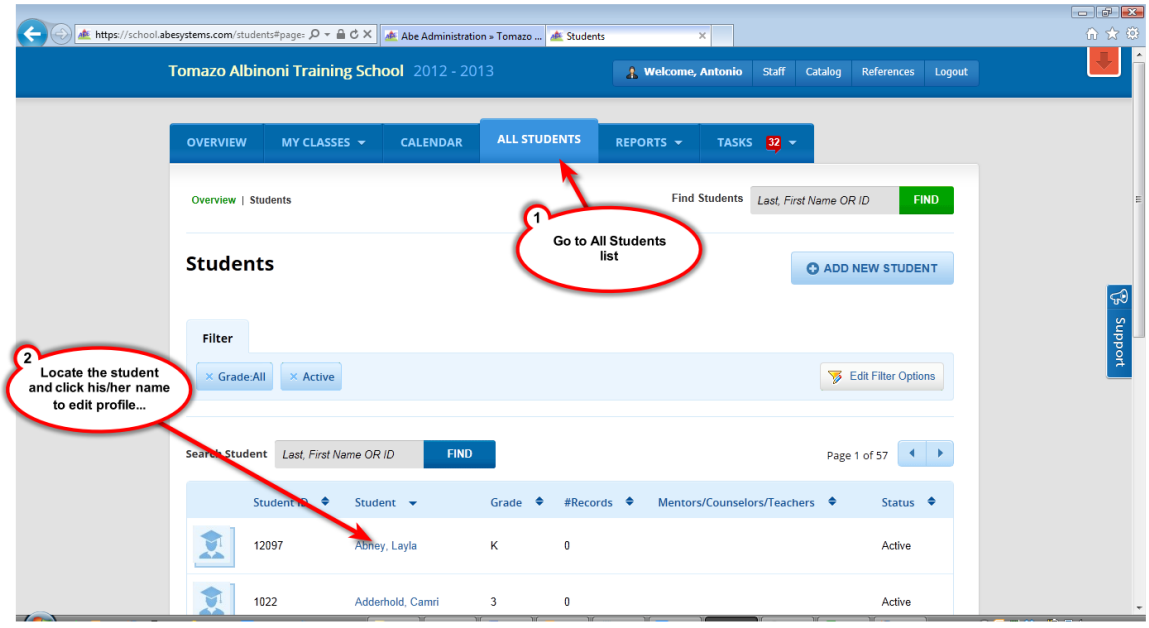
Archiving a student leads to deactivating his/her profile in the system. It will also result in all the pending events/activities (intervention assignments in progress, FBA observations in progress, print letter and progress monitoring tasks, flag reviews etc.) for such a student to be force closed.

However, the archived student will still show in Student list, student search results etc. His/her activities will be accounted in school reports.

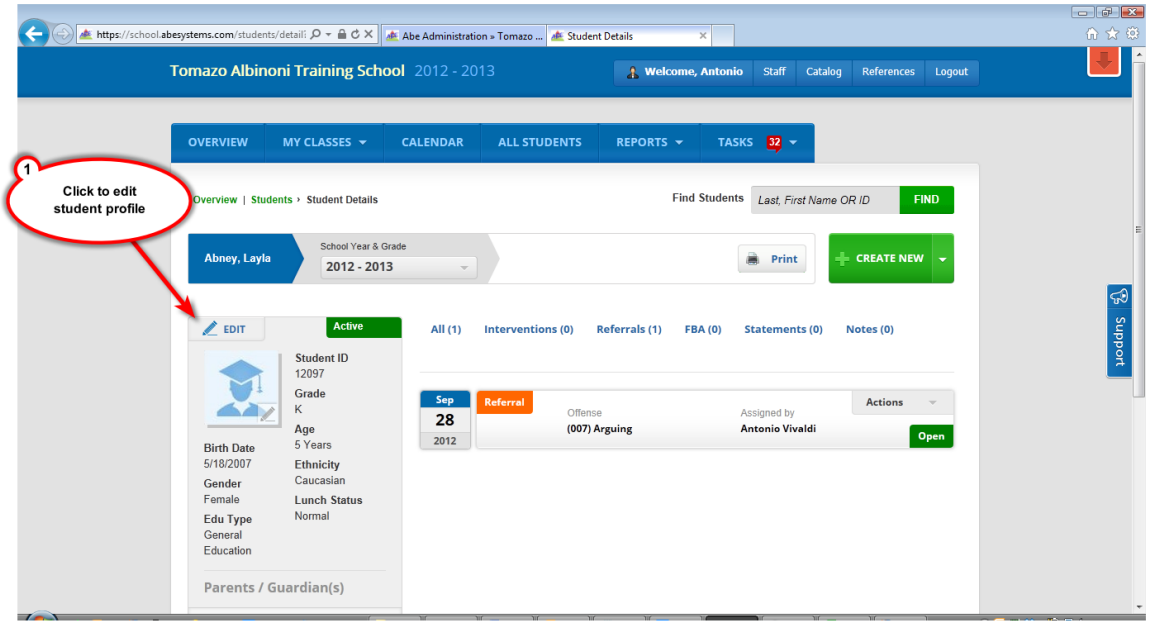
You will be able to return him/her back to the active state through Un-archiving.

To archive a student, you act as follows

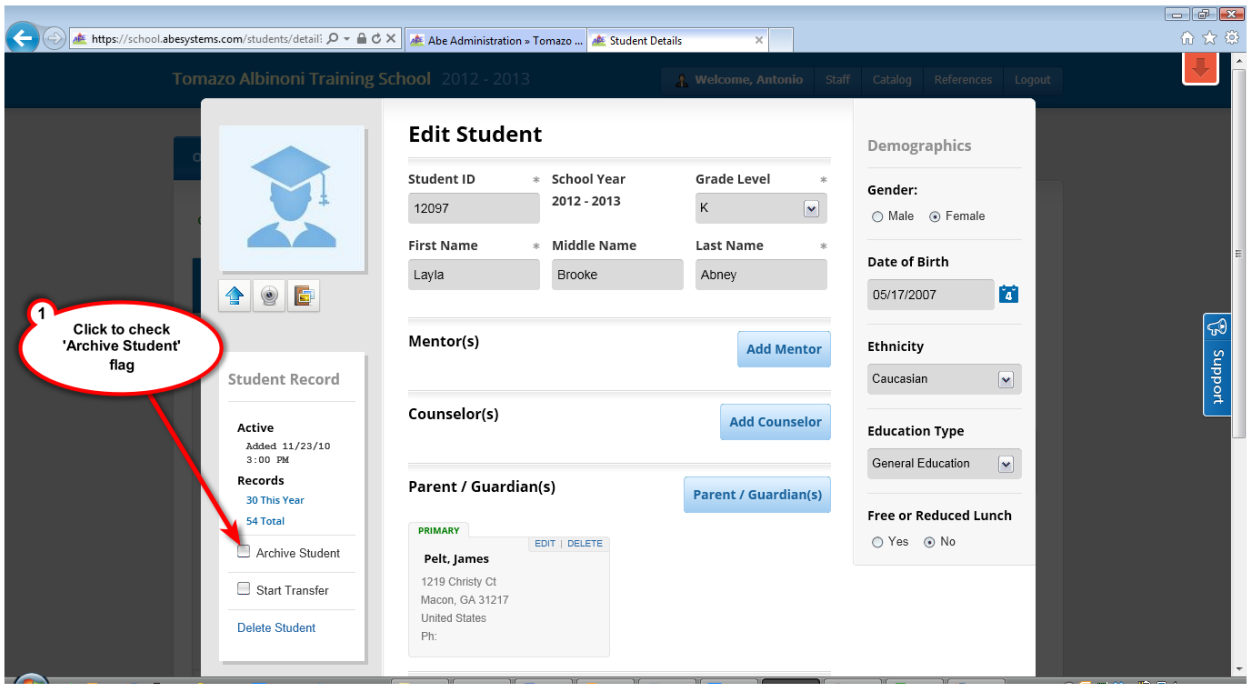
1. Go to *All Students* list and locate the target student to archive (through student search, student filtering, or navigation through the list)



2. Once you find the target student in the list, you click his/her name to go to his/her Student Details view

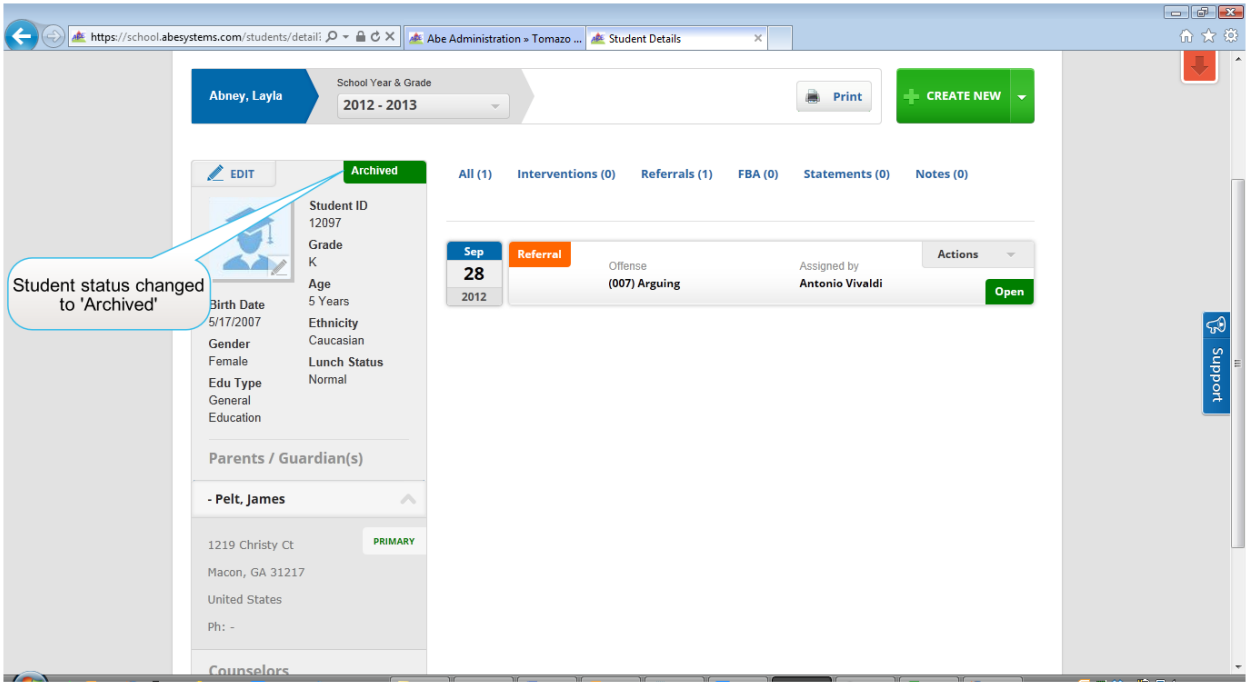


3. Click Edit button in the top left corner of the left sidebar to start editing the student profile
4. In Edit Student page, check 'Archive Student' flag



5. Click Save Student button to trigger the student archiving process

As a result, the system moves the student to 'Archived' state. This will reflect in the status label in Student Details view



Notes:

1. To un-archive the student, you repeat activities above. The only difference is you will have to uncheck 'Archive Student' flag in 'Edit Student' page.
2. Technically, you will still be able to create Student Notes and various activities for the archived students. The main purpose of archiving is to exclude student records from the active use (as the default student filtering settings in the majority of application screens display active students only).

Delete a student

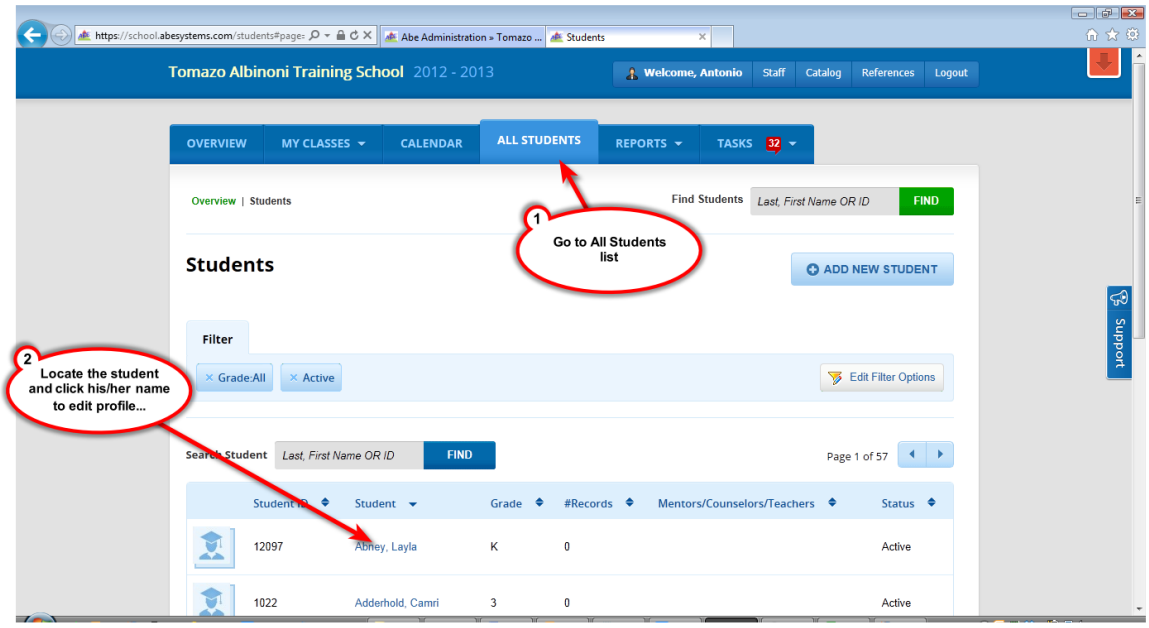
Deleting a student leads to eliminating his/her profile from the system. It will also result in all the pending events/activities (intervention assignments in progress, FBA observations in progress, print letter and progress monitoring tasks, flag reviews etc.) for such a student to be force closed.

His/her activities will be accounted in school reports.

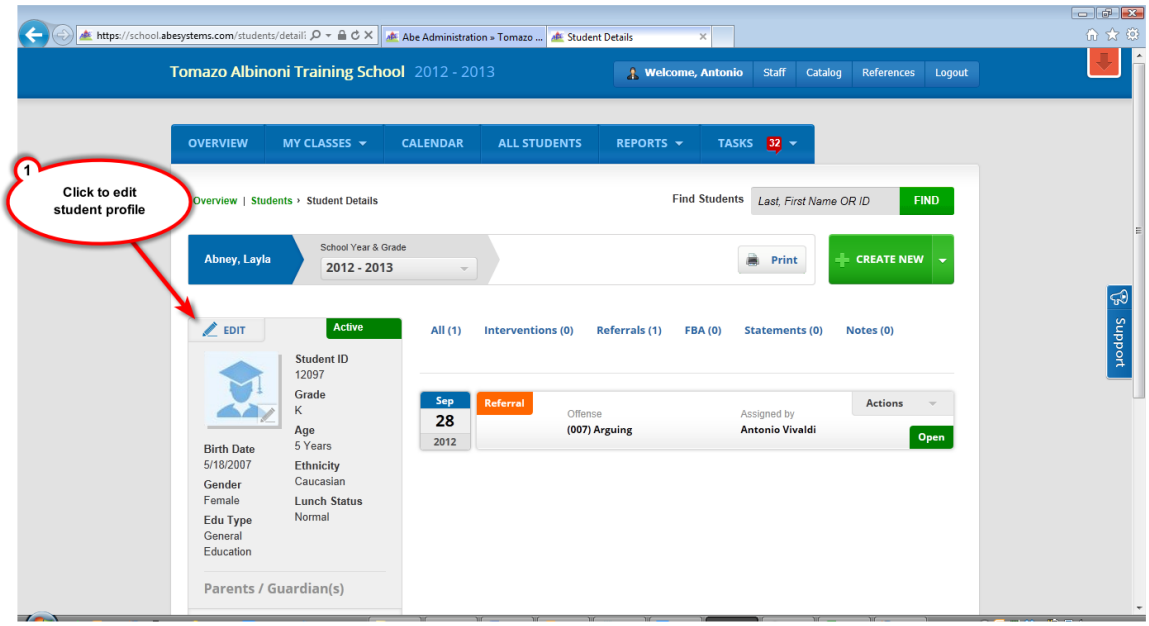
However, the deleted student will not show in Student list, student search results etc. (unlike archived ones).

To delete a student, you act as follows

1. Go to All Students list and locate the target student to archive (through student search, student filtering, or navigation through the list)

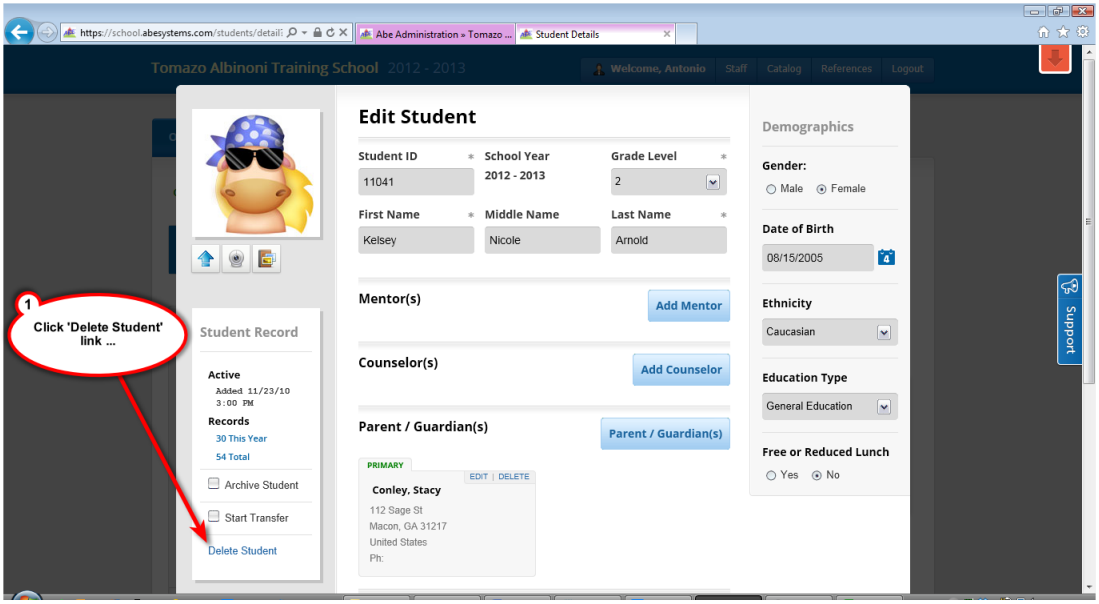


2. Once you find the target student in the list, you click his/her name to go to his/her Student Details view



3. Click Edit button in the top left corner of the left sidebar to start editing the student profile

4. In Edit Student page, click *Delete Student* link



5. The message prompt appears, “Are you sure you want to delete [Student Last Name, Student First Name]? There is no undo for this operation.”
6. If you press OK in the message prompt, the system will ultimately delete the student. He/she will never show up in the student list again

Notes:

1. You may click Cancel in the message prompt to cancel deleting the student
2. There is no undo to deleting a student

Merge students

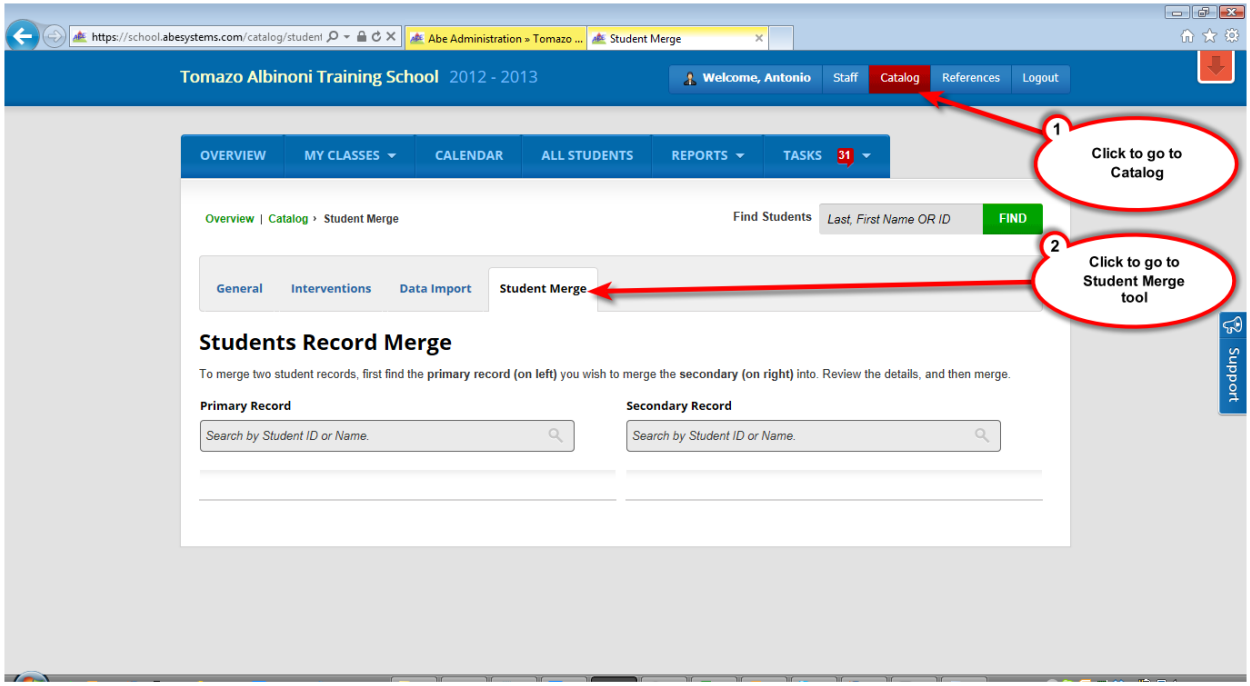
The purpose of this feature is to enable School Administrators with capability to merge information about 2 student records into one. It may be helpful if, for various reasons, system appeared to have 2 records for the same student.

When student B (‘source’ student, or secondary student record) merged to student A (primary student record), the following processing rules apply

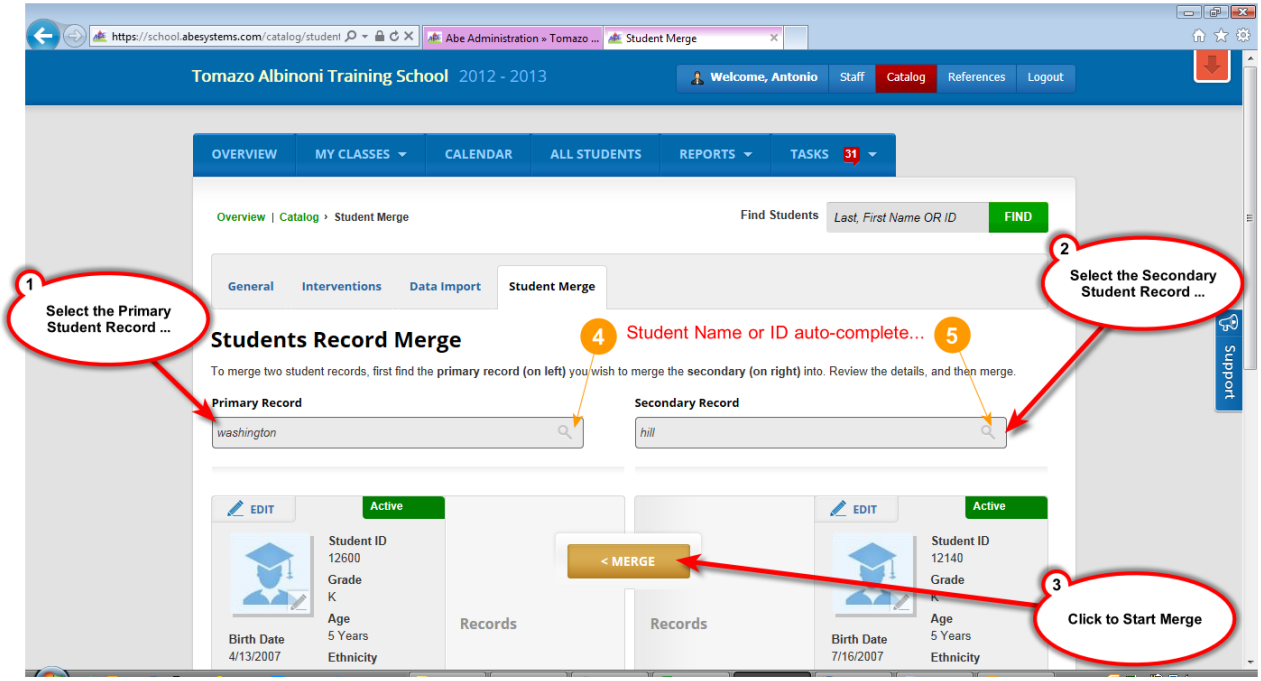
- If respective parameters on profile for student A already filled, they are not updated from the profile of student B
- If respective parameters on profile for student A are empty, they are populated with information from the respective fields of the profile of student B
- All Activities of student B are added to activities of student A, with an exceptional process for open Observations (see below)
- The exceptional process for open observations is follows
  - There is a rule that observation 1 cannot be created if there is the observation 2 for the same student with dates that intersect with observation 1 dates

- So, if there are observations for student B that have date intersection with open observations for Student A , the observations of the 'source' student (Student B) shall be deleted
- Student B ('source' student, or secondary student record) is automatically deleted once the system successfully completes merge

To initiate student merge process, you go to Merge Student Record view in Catalog



When in Merge Student Record view, you select primary and secondary records of students to merge



As a result, the system will display Student Details view for the primary student with all the records of the secondary student merged together, per the rules above.

Referral Resolution

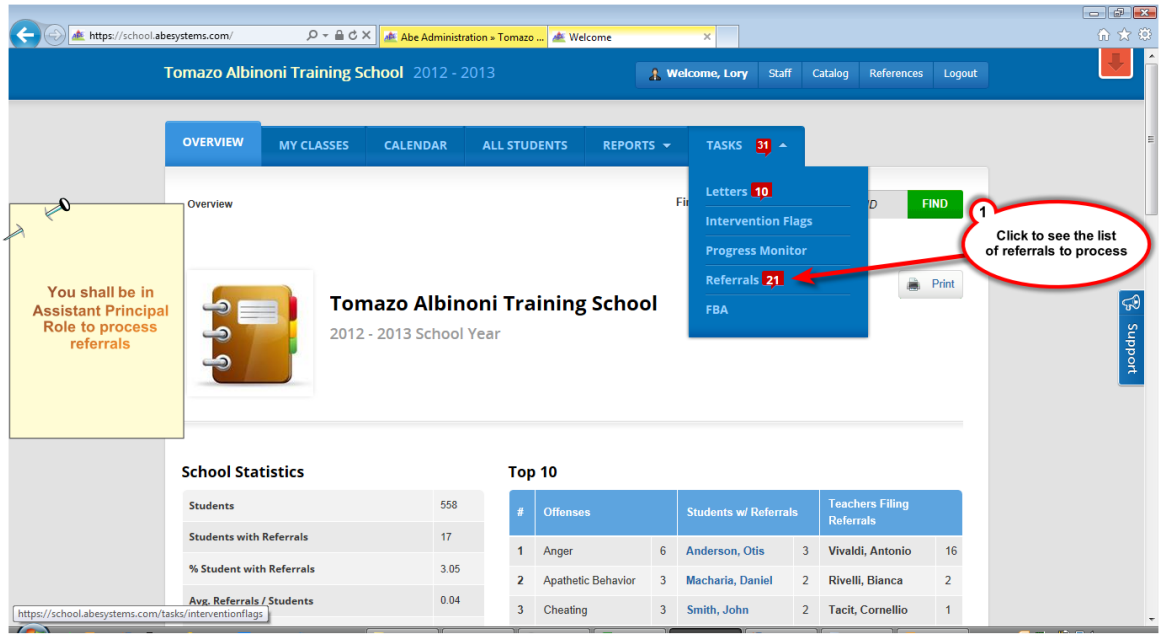
Referral resolution (processing) is the final stage of the referral management process within ABE. It entitles the action/decision of Assistant Principle official on the referrals filed by teachers. It is facilitated through a special processing interface in Referral details view.

Notes:

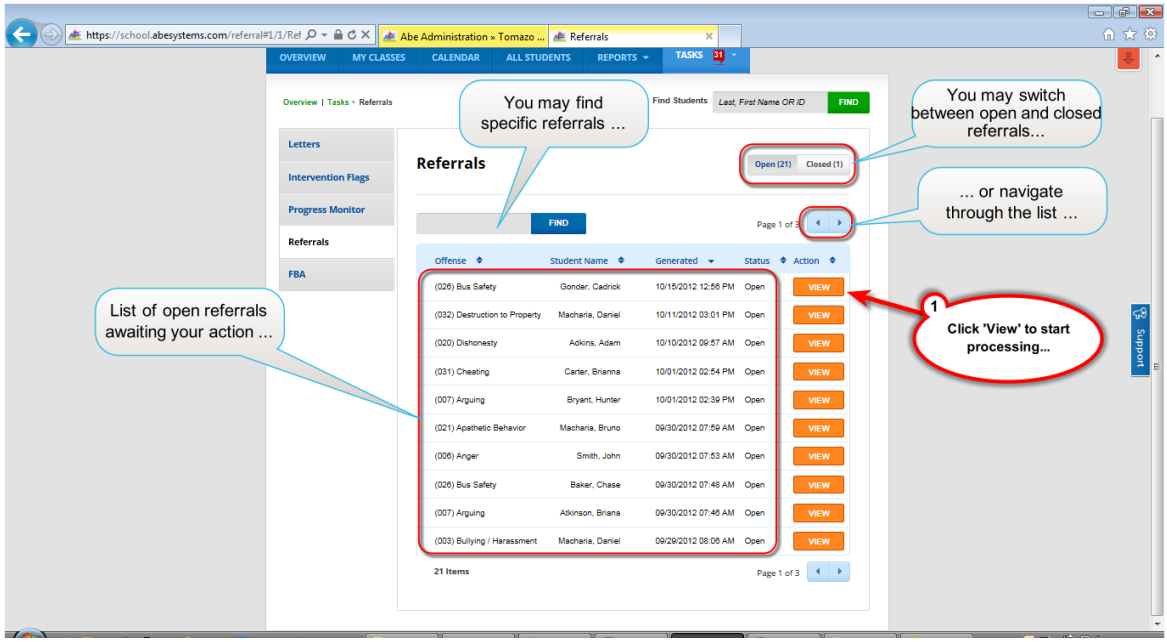
1. Referral processing interface is only displayed to users in Assistant Principal Role. Other users do not see it when visiting the respective referral details view
2. Current version of ABE enables one user in Assistant Principal role per school

In order to process referrals, you take the steps below

1. Click Tasks > Referrals in the main menu

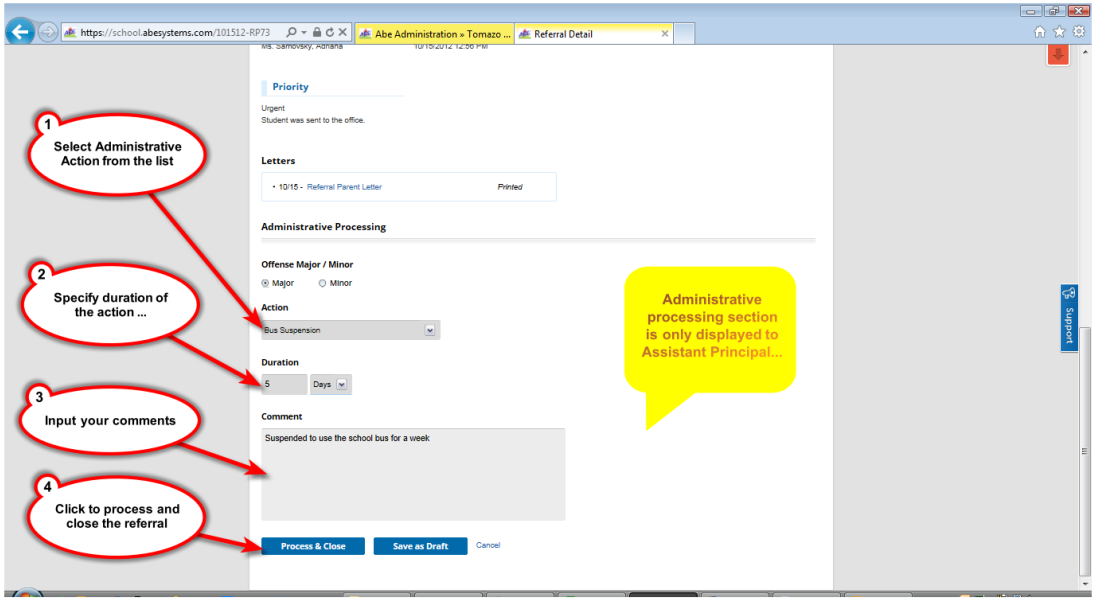


2. In the list of open (pending)referrals to proceed, click View button near the open referral you choose to process



3. In Referral Details view, scroll down to Administrative Processing section to process referral as follows
    a. Select the administrative action for the referral
    b. Specify duration of the action (optional)

c. Input your comments for more details and the context on the action taken (optional)



4. Once you click 'Process & Close' button, the referral is turned to 'Close' state. In the list of Referral tasks, it will no longer listed under Open list. Instead, you will be able to find it in Close list.

To process all of the open (pending) referrals, you repeat steps 2-4 above for every open referral in the list.

Note: School Administrators can see pending referrals in their Tasks menu as well. This is on purpose as it provides the School Administrators with visibility of whether Assistant Principal processes referrals on the regular basis or not. School Administrators cannot process referrals by themselves.

Specific Administrator Reports

In addition to generic reports on Interventions, Referrals, and Correlations that every staff member can access, School Administrators have the privilege of using two specific kinds of reports

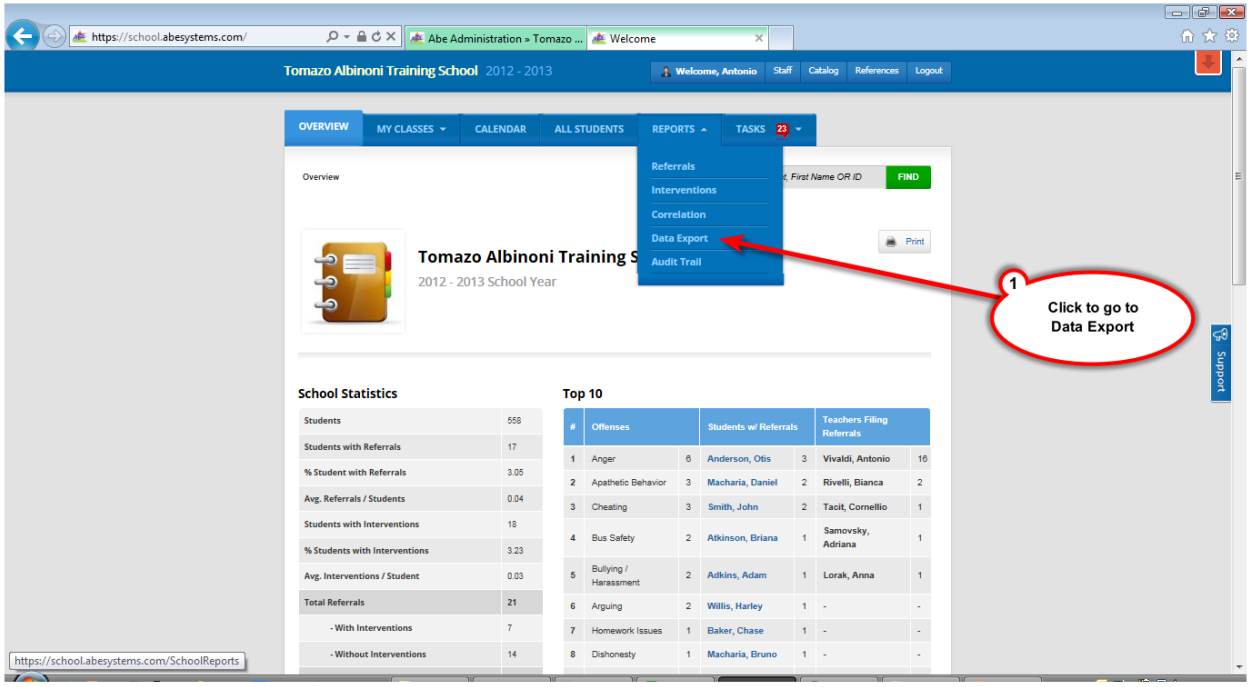
1. Data Export
2. Student Audit Trial

Data Export

Data export will provide you with all of your student assignments data in an easy to use CSV file. This file can be opened in Excel or any statistical package as well as used for backup purpose or to integrate into other custom reports you create.

You can filter this report by date range, students or student mentor.

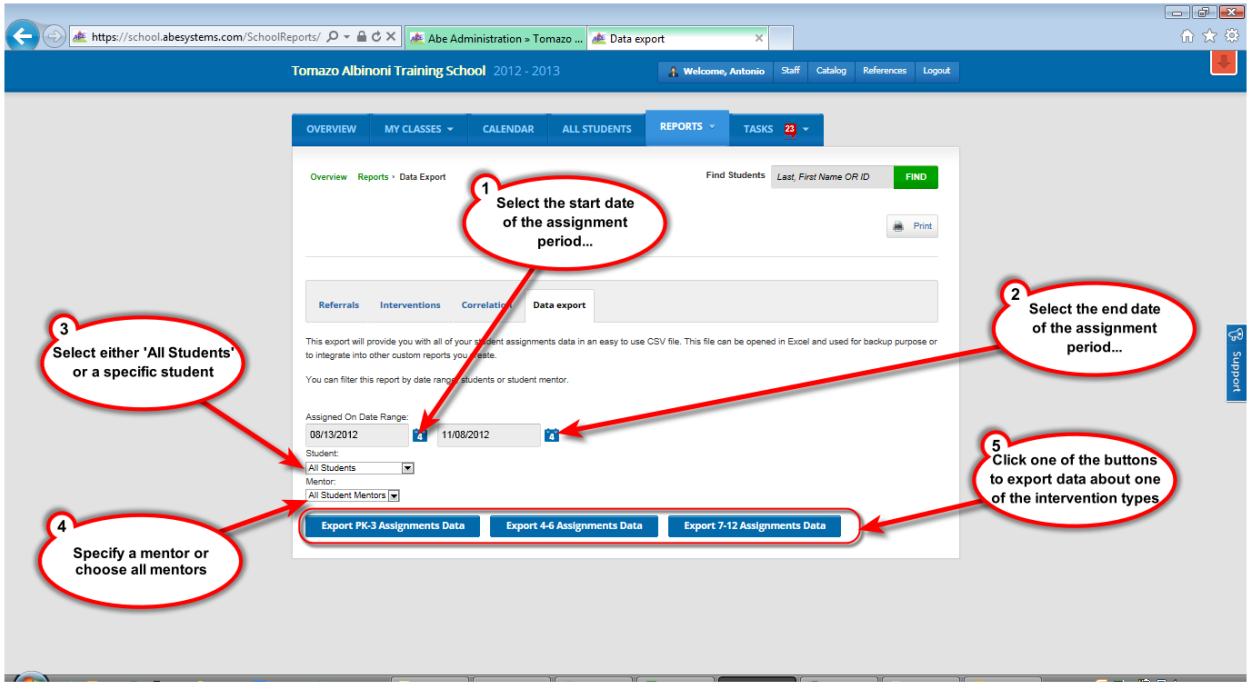
To go to data export view, you click *Reports > Data Export* in the main menu



In Data export view, you configure your data settings

1. Set 'Assigned On Date Range' (Start and End dates of the interval)
2. Select a student to export intervention for (or select 'All Students' to export all intervention data)
3. Select a particular Student Mentor or choose to select by all mentors

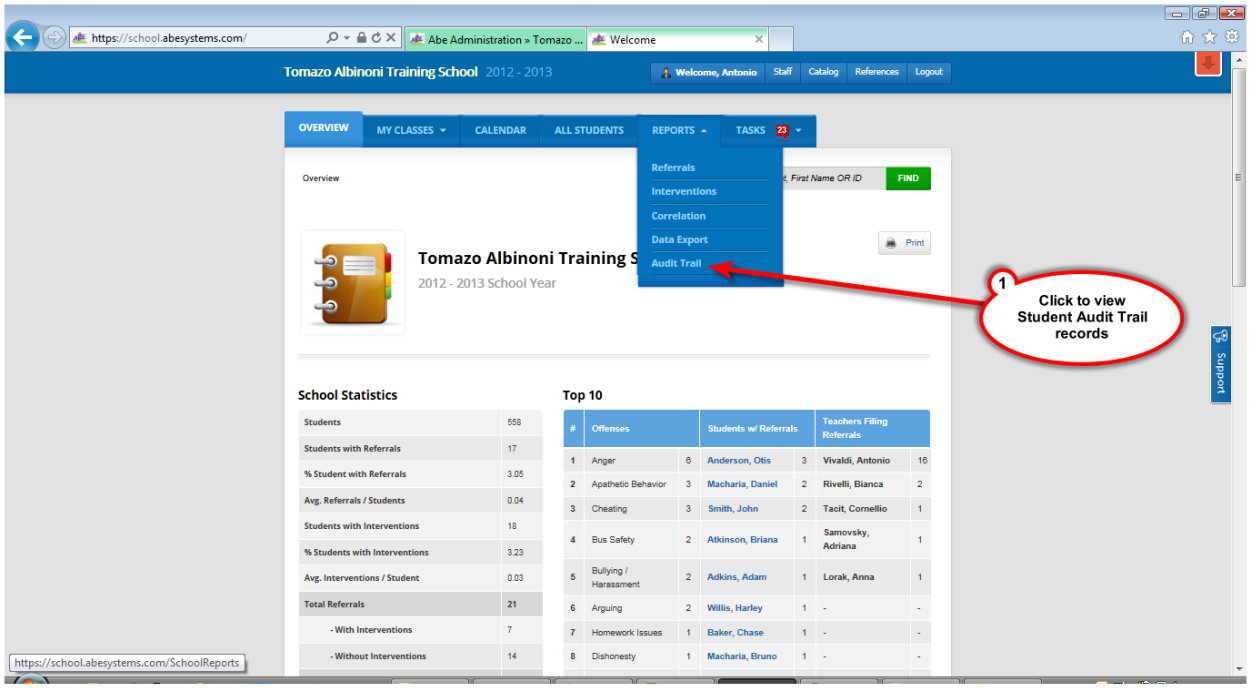
Then you press one of the buttons in the bottom to generate CSV file with data of one of the intervention assignment types (pk-3, 4-6, or 7-12)



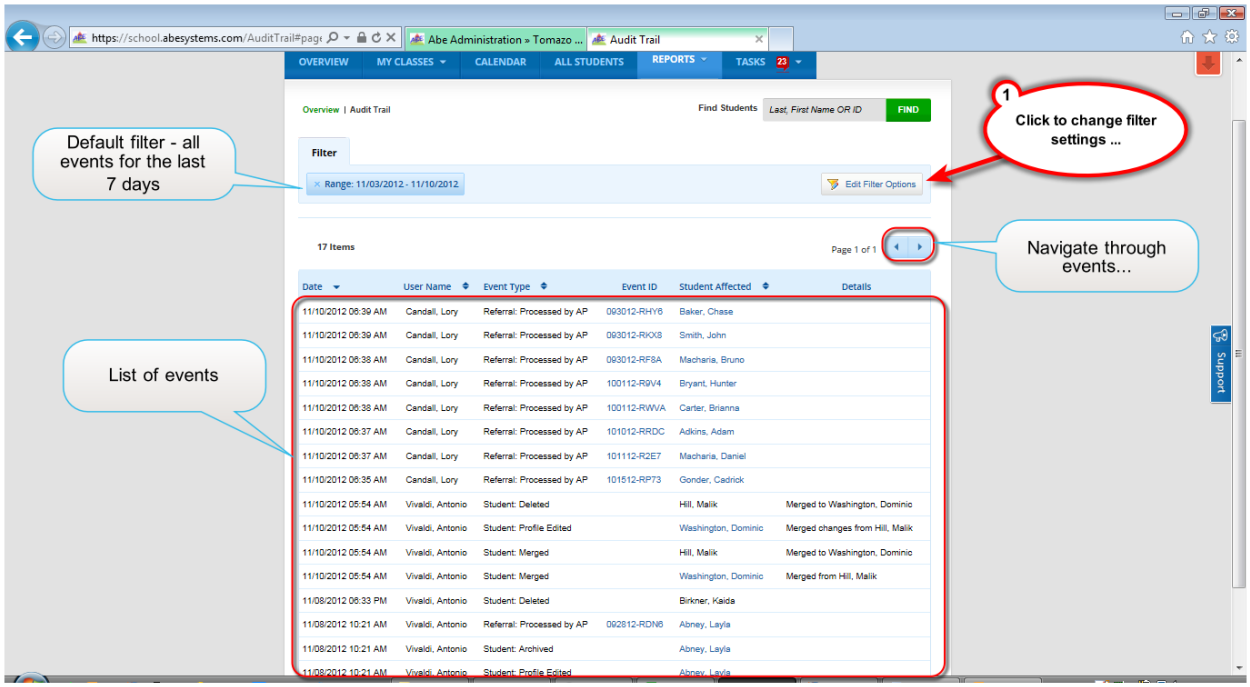
Student Audit Trail

The purpose of this report is to provide School Administrators with ability to track and review various activities occurred with students in the system (new students added; new student assignment added; student logins-logouts; interventions completed; observations completed etc.).

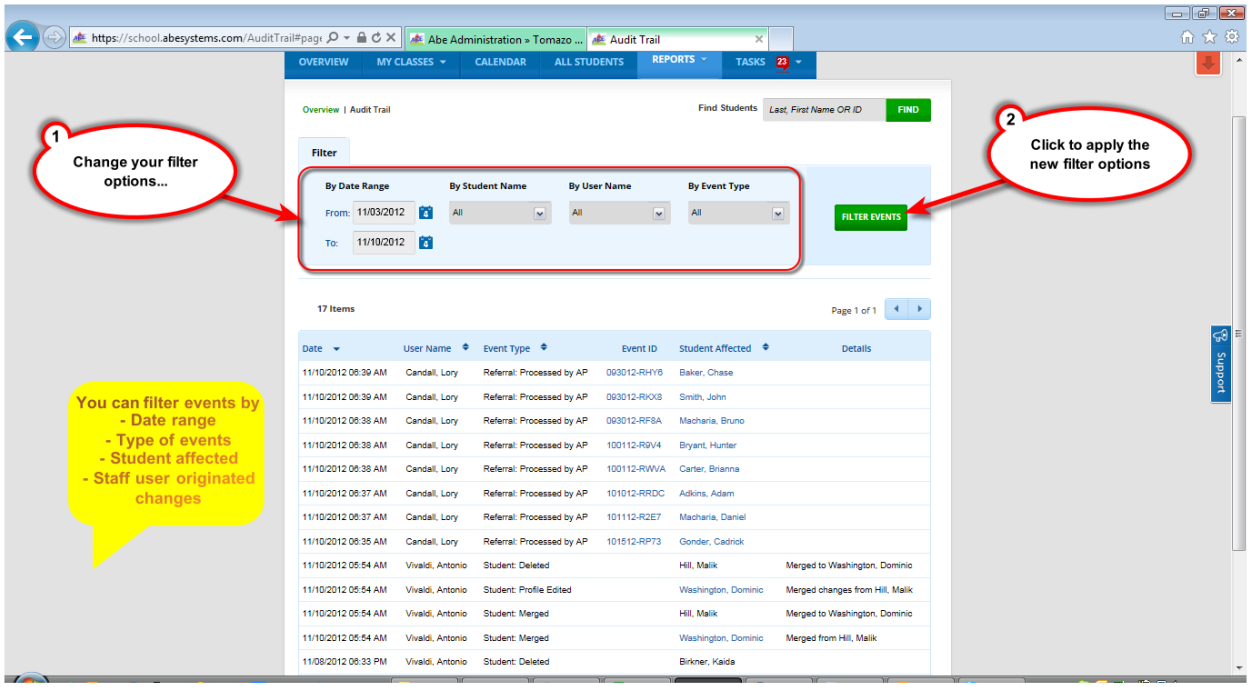
To review Student Audit Trail records, you click *Reports > Audit Trail* in the main menu



In Student Audit Trail view, you can review and analyze the changes to the student records in your school



You can change event filter settings to locate specific events you are interested in if you click 'Edit Filter Options' button. Edit filter layer will be displayed


Change your filter options...
Click to apply the new filter options
You can filter events by
- Date range
- Type of events
- Student affected
- Staff user originated changes

You can filter events by

- Date range

- Type of events (see Appendix, section “Student Audit Trail Details”, below for the detailed list of event types)
- Student affected
- Staff user originated changes

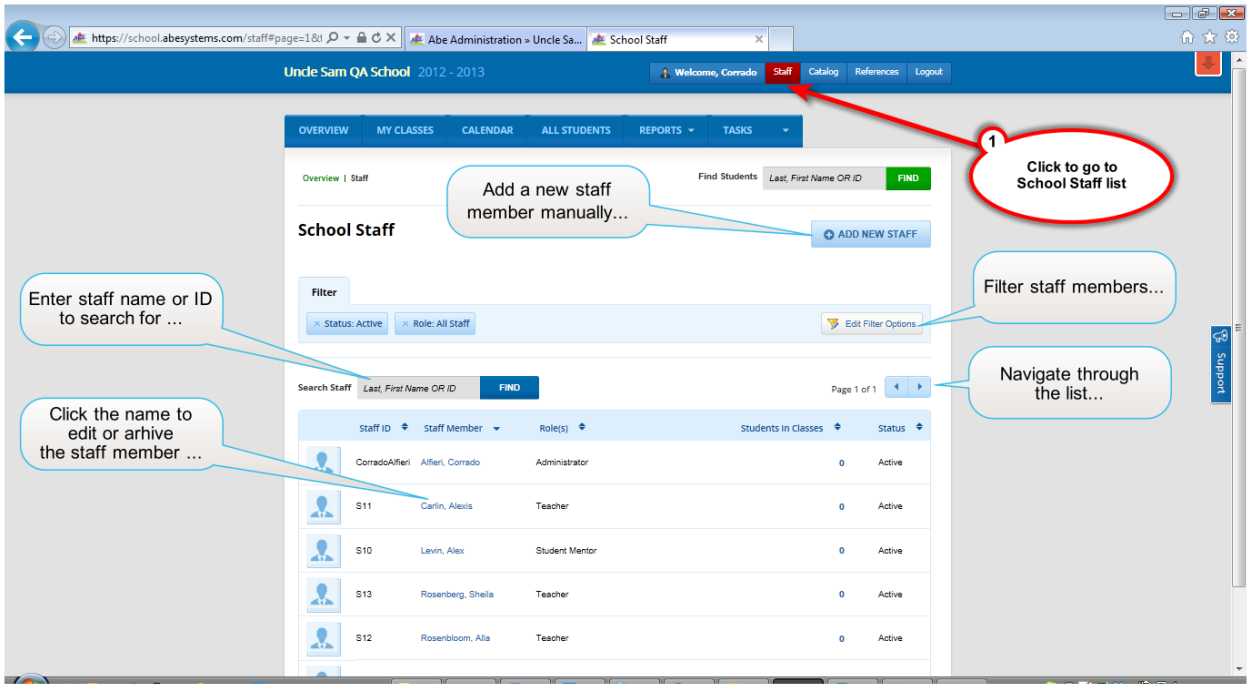
Note: Please see Appendix (namely, section “*Student Audit Trail Details*”) below for more details on how Student Audit Trail works in the system

Managing Staff through School Staff List

Staff List is the tool to assist you with

- Searching for staff records
- Editing staff profile details
- Resetting user password
- Adding new staff members manually
- Archiving an existing staff member
- Setting profile pictures for teachers and other staff members in the system
- Setting specific user-level access privileges (if default role-based privileges do not fit the functional responsibilities of the staff member in the system)

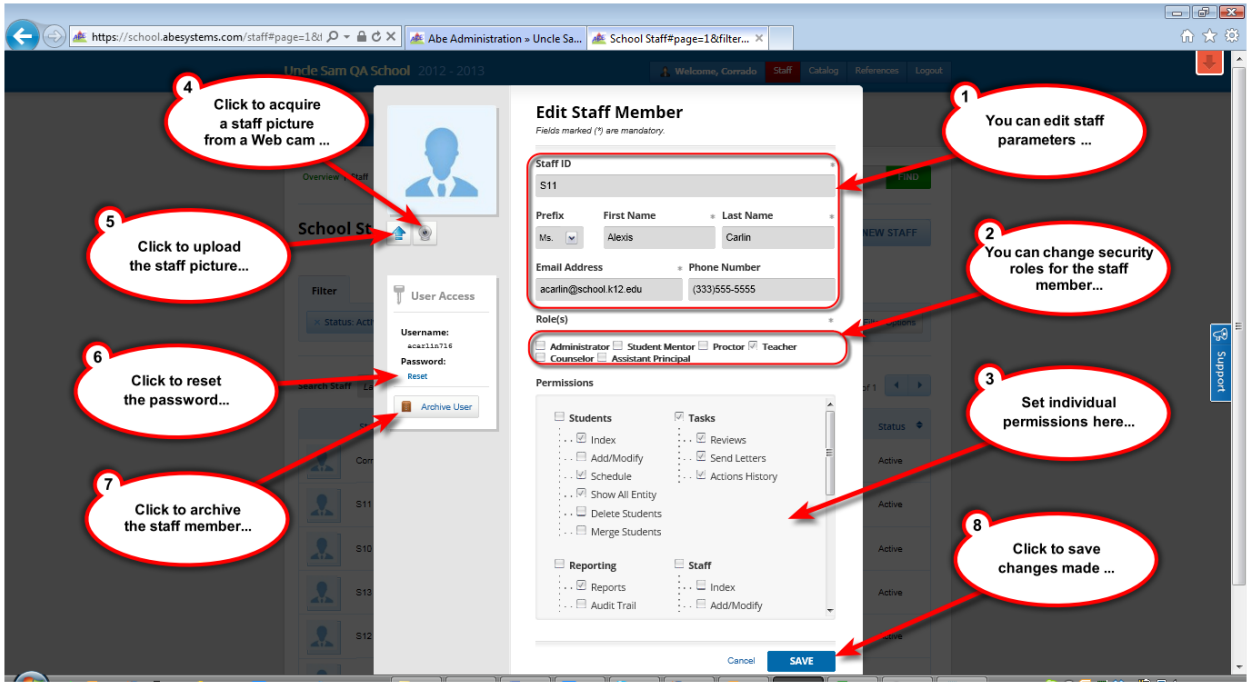
To access your School Staff list, you click ‘Staff’ item in the top menu



Note: ‘Students in Classes’ column indicates the number of students in the classes created by this staff member (see ‘Classes’ Training module for more details on how to build your classes in the system).

Editing Staff Member Details

To edit a staff member details, you click on its name in the staff list. Edit Staff form appears as follows



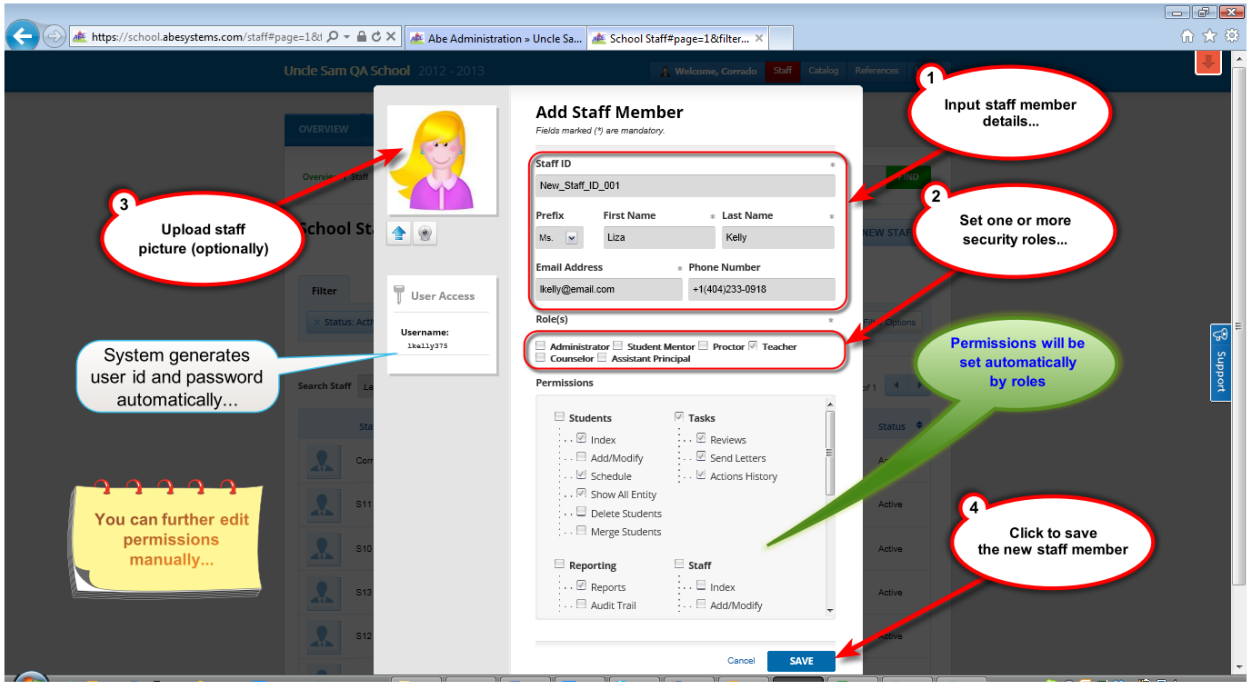
Notes:

1. Besides editing the profile itself, this form facilitates additional user management activities (resetting password, managing user privileges, and archiving the staff member) – see details in the figure above
2. System generates the user name to your staff member automatically (either during the import process or when you add him/her manually)
3. When you reset the password for the staff member, the system will automatically send the respective 'Password Changed' email notification to his/her email address on file
4. You may assign the staff member one or more roles in the system
5. By default, permissions correspond to the roles you set for the user. However, you may want to manage permissions for a particular user individually if his/her functional responsibilities dictate a unique set of privileges assigned in the system
6. The mechanism of uploading/acquiring the profile image/photo is the same as in 'Edit Your Profile/Password' form (see 'Introduction' training module for more details)
7. Every staff member can change his/her profile image as well as basic profile details (but not security roles) through Edit Your Profile/Password' form (see 'Introduction' training module for more details)

Adding a New Staff Member

If you school does not have much staff you can input your staff member records manually. You can also use this functionality to add a new staff member in the middle of the school year, if need be.

To add a new school staff member, you go to School Staff list and press 'Add New Staff' button (see above). 'Add New Staff' dialog appears



Note: When you click 'Save' button to create a new staff member record, the system will automatically send the user a message to tell his/her user id and password in the system

Student Transfer

The purpose of ABE student transfer is to move students across schools within the same district.

When a student is transferred, the following changes will occur in the source school (original school):

- When a student is transferred to a different school, all of the student records remain in the old school and are also copied (as read-only entries) into the new school
- If any interventions are opened, flagged, or in review at the time of the student transfer, they are force closed
- If any referrals are pending at the time of the student transfer, they are force closed
- If any FBA observations or Progress Monitoring observations are in progress at the time of the student transfer, they are force closed
- Transferred students are automatically removed from "My Classes" and their statistics do not show in Class Reports
- Transferred students are automatically excluded from the student count for the school (both in the manager site and in School Overview page)

- Records (Referrals, Interventions etc.) of transferred students in the current school year still contribute to the school reports for the current year
- Any pending Parent Letters are automatically switched to a 'Printed' state in the source school, and are transferred as "Printed" into the new school
- Transferred students will not show on All Students or student search results in the source school

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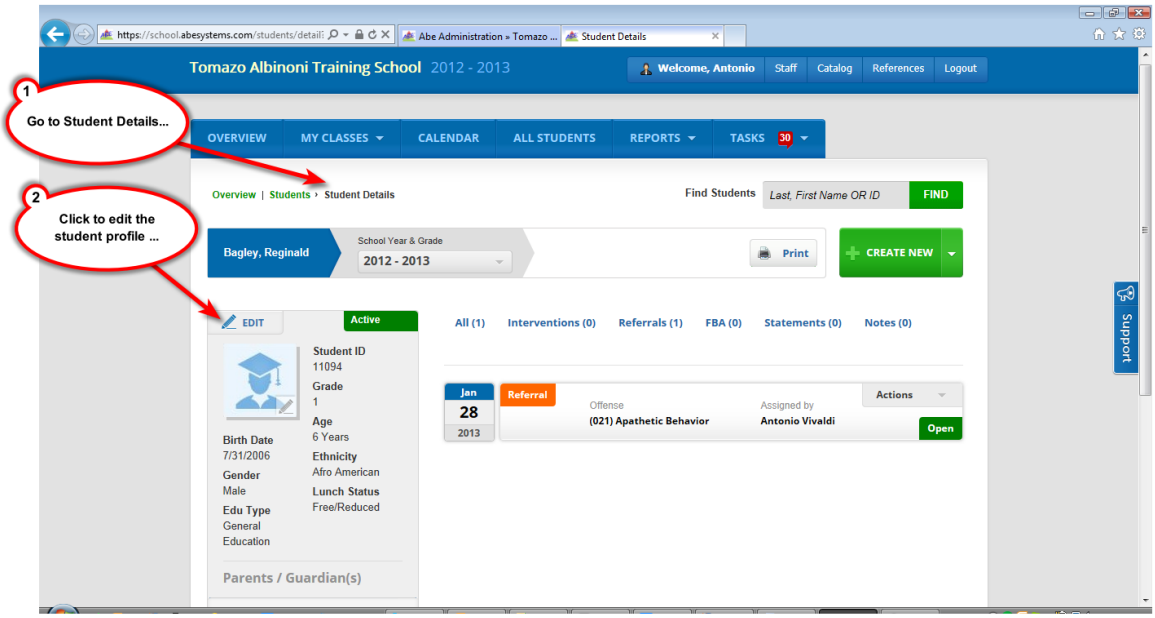
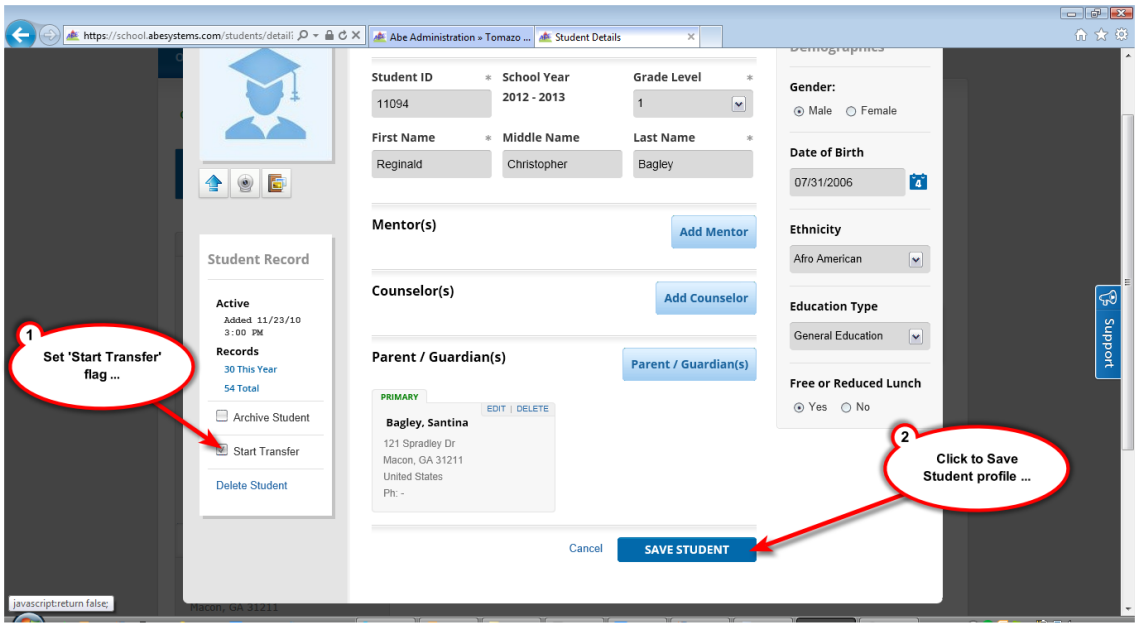
To perform transfer of individual students, complete the following:

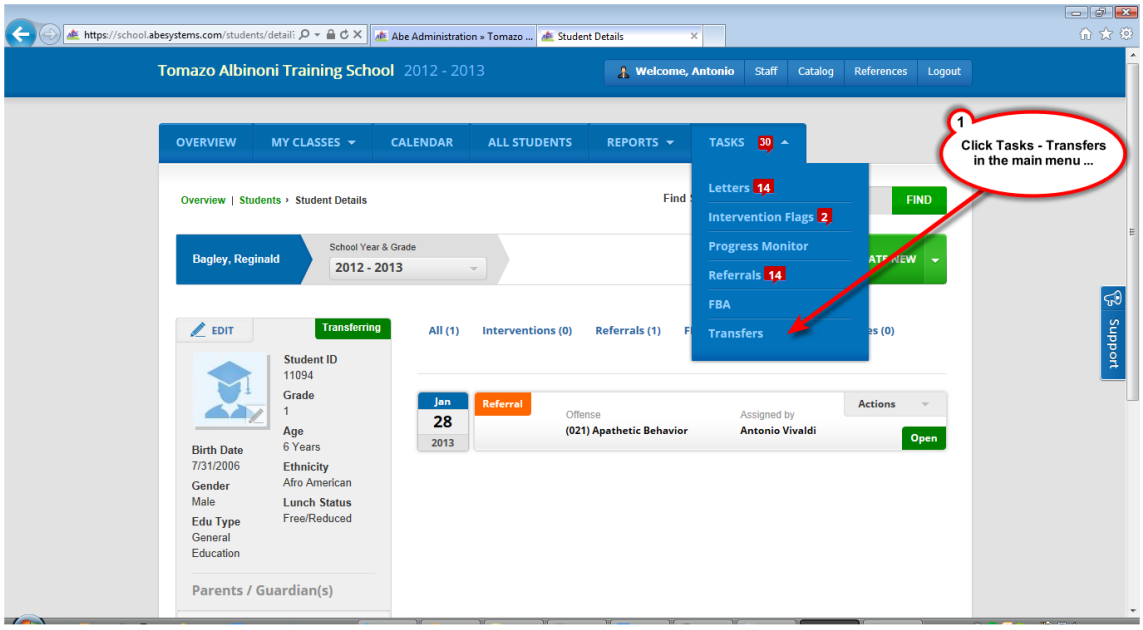
6. Go to the Student Detail Page of the student you would like to transfer and choose to Edit his or her profile:



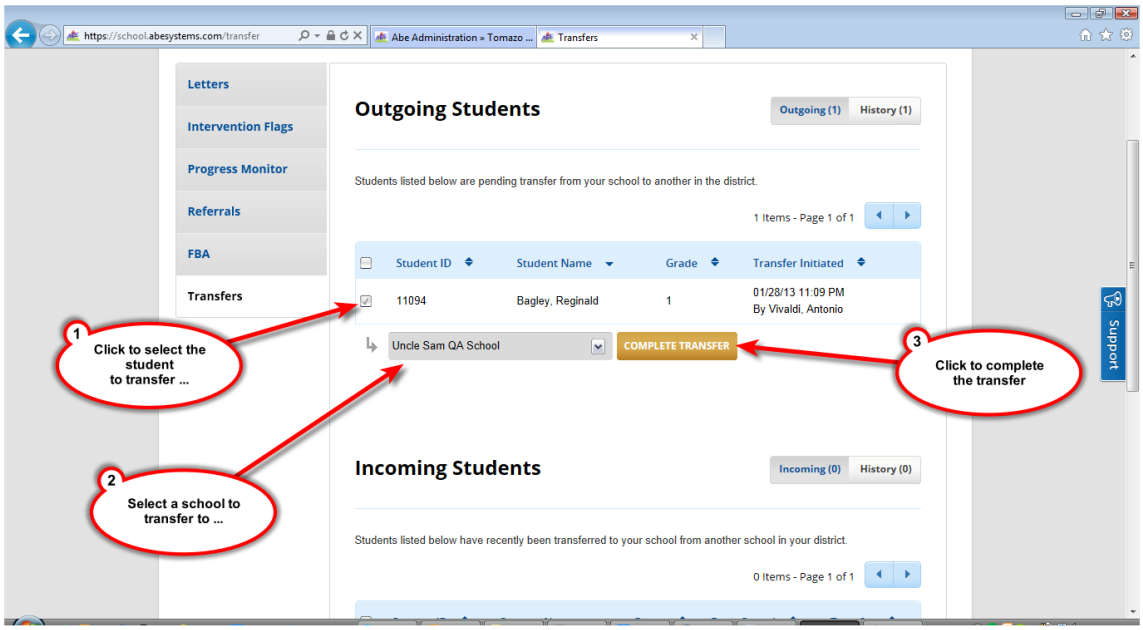
7. When in Student profile, check the 'Start Transfer' box and click "Save Student"



8. Go to *Task – Transfers* in the main menu

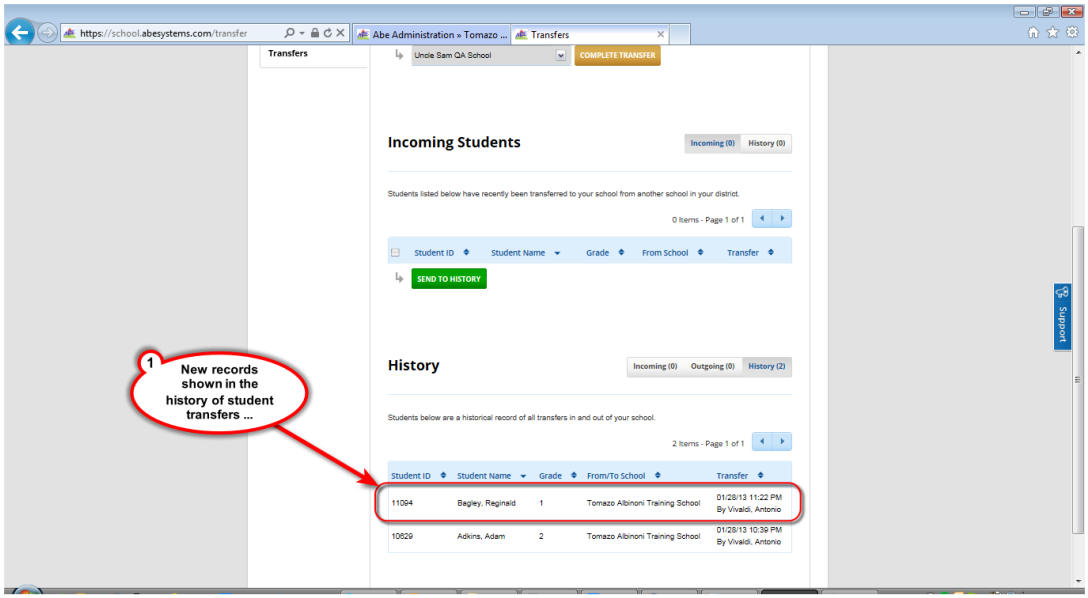


9. In the Transfers view, navigate to the 'Outgoing Students' section to complete the transfer as shown below:



Notes: If you have multiple outgoing students, you can select more than one student to transfer at one time.

10. Once the system completes the transfer, you will see updated Transfer History records at the bottom of the 'Tasks – Transfer' view



Note: ABE does not support automated transfer of students to another district. If your student is going under jurisdiction of another School district, you will have to archive this student in your school.

Student Transfer in Bulk Mode

When you bulk import students for a new school year, your data file will not contain students who transferred to another school within the district.

To set this, launch the Data Import Wizard (see School Configuration Module for more details on using Data Import Wizard). Choose 'Transfer.' as an action for students who are in the database for the previous school year but not on your current data import file.

As a result, such students will appear in the 'Tasks – Transfer' view. You will be able to complete the operations described above to transfer them to other schools as needed.

Best Practices

In order to optimize your regular system administration/maintenance activities, it is recommended to implement the following best practices

1. Establish a process of adding/editing student profiles through the special non-technical staff roles (Counselor and/or Assistant Principal)
2. Become the point of contact with ABE Support Team to make sure you track status of all incidents your school users may have with the system
3. Establish the discipline of regular processing referrals by Assistant Principal. Prompt the Assistant Principle to take actions if the counter of unprocessed referrals hits high
4. Encourage Assistant Principal to leave comments on the administrative actions for the referrals processed

5. Establish the discipline of regular interventions review

Appendix

Student Audit Trail Details

1. For each event logged, the following attributes will be recorded and stored in log
    a. Date and Time of the event
    b. User name (user who originated the event)
    c. Event type
    d. Event Id
        i. shows the unique id of the event in the system
        ii. when displayed in grid, it shall be click-able link to the event details page
        iii. It can be omitted for some types of events where no connections to FBA, Interventions, Referrals, and observations are available (like password change, user log in/off the site etc.)
    e. Name of the student affected
        i. when displayed in grid, it shall be click-able as a link to the respective Student Details page
        ii. may be optional for the events not related
    f. Event Details (optional comment that is written along with the log entry - it may, for instance, indicate that a new student profile created during bulk import etc.)
2. The following event types are logged/tracked
    a. Added a new student
        i. If multiple new students added in bulk mode during Student Import, each new Student profile generates a separate entry in the system log
    b. Edited a student profile
    c. Archived a student
    d. Deleted a student
    e. pk-3 Intervention Assigned
    f. 4-6 Intervention Assigned
    g. 7-12 Intervention Assigned
    h. pk-3 Intervention Completed (with flag)
    i. pk-3 Intervention Completed (without flag)
    j. 4-6 Intervention Completed (with flag)
    k. 4-6 Intervention Completed (without flag)
    l. 7-12 Intervention Completed (with flag)
    m. 7-12 Intervention Completed (without flag)
    n. pk-3 Student Observation Completed
    o. 4-6 Student Observation Completed
    p. FBA Created
    q. FBA Completed
    r. Referral Sent to AP
    s. Referral Processed by AP

t. pk-3 Student Observation submitted
u. 4-6 Student Observation submitted
v. FBA observation submitted

3. When student's transfer operation is performed, it shall generate two log entries
    a. the student archived in the old school
    b. the student added in the new school
4. Log purging and historic log data roll-up are not required
5. Logging in and off via Desktop Notification tool shall not be logged